

## National Credit Union Administration **Deborah Matz**Board Member

May 22, 2003

**SUBJECT:** *Making the Latino Connection* 

A PALS Workshop for Credit Unions

**LOCATION:** Durham, North Carolina

**WORKSHOP DATE:** July 8, 2003

**TIME:** 8:00 AM until 5:00 PM

I am pleased to invite you to participate in a workshop that offers credit union representatives an opportunity to share ideas and methods for serving members of the Latino community within their fields of membership. This workshop, which is part of our Partnering and Leadership Successes (PALS) initiative, is co-hosted by the Alabama, Georgia, North Carolina, and South Carolina Credit Union Leagues.

Credit union officials who have experience serving Latino communities will present their successes and discuss how their credit unions have benefited from their connection with the Latino community. Representatives from the National Council of La Raza, World Council of Credit Unions, Internal Revenue Service, and Ohio and Washington Credit Union League Foundations will explain their programs and discuss partnering opportunities to serve the Latino communities. The workshop agenda is enclosed.

This free workshop will be held at the Durham Marriott (Civic Center) on July 8 from 8 AM until 5 PM.

If you are interested in attending this free workshop, please complete the <u>registration</u> form and fax it to the National Credit Union Administration's Office of Credit Union Development (OCUD) at 703-518-6619.

If you have any questions, please call OCUD at (703) 518-6610 or email the office at ocudmail@ncua.gov.



## **Partnering and Leadership Successes**

## July 8, 2003 Making the Latino Connection A PALS Workshop for Credit Unions



"To share ideas and methods for serving members of the Latino community within their fields of membership."

8:00 AM	Continental Breakfast/Exhibits/Networking
8:30 AM	Opening Session  ♣ NCUA Board Member Deborah Matz  ♣ President Gary Wolter, Alabama Credit Union League  ♣ President Michael Mercer, Georgia Credit Union League  ♣ President Larry Johnson, North Carolina Credit Union League  ♣ Vice President Ed Culpepper, South Carolina Credit Union League
9:00 AM	Connections to the Latino Community  Harriet May, President, Government Employees Credit Union of El Paso  Luis Pastor or John Herrera, Latino Community Credit Union  Thomas Light, President, Family Security Credit Union  Pablo DeFilippi, CEO, Lower East Side Peoples Federal Credit Union
10:15 AM	Break
10:30 AM	<ul> <li>Latino Community Financial Services Needs &amp; Winning Marketing Strategies</li> <li>➡ Brenda Muniz, National Council of La Raza</li> <li>➡ Don Casselman, Executive VP, Financial Marketing Group</li> <li>➡ Debra McLean, VP Marketing, Charlotte Metro Credit Union</li> </ul>
11:30 AM	Working Lunch
1:00 PM	<ul> <li>Membership Services</li> <li>Beckie Harrell, Program Analyst, Internal Revenue Service – Individual Taxpayer Identification Numbers and Volunteer Income Tax Assistance</li> <li>Robert Fenner, NCUA General Counsel – Documentation Requirements</li> <li>David Grace, World Council of Credit Unions – International Remittances</li> </ul>
2:15 PM	Break
2:30 PM	<ul> <li>Financial Literacy Programs Panel</li> <li>♣ Sue Helmreich, Outreach Program Manager, Ohio Credit Union Foundation's Latino Financial Literacy Program</li> <li>♣ Marilyn Jarmon, Administrator, Washington CUL Foundation's Poder Economico</li> </ul>
3:00 PM	<ul> <li>Credit Unions Providing Services to the Latino Community</li> <li>♣ Nicki Amos, Senior VP, Founders Federal Credit Union</li> <li>♣ Kendrick Smith, VP Finance, Eastern Financial Florida Credit Union</li> <li>♣ Carla Decker, President, District Govt. Employees Federal Credit Union</li> <li>♣ Maurice Calderon, Senior VP, Arrowhead Credit Union</li> <li>♣ Miguel Avila, Chicanos Por La Causa Federal Credit Union</li> </ul>
4:30 to 5:00	Workshop Roundtable Discussion







## **Hotel Information**

Durham Marriott at the Civic Center 201 Foster Street Durham, NC 27701

North Carolina Credit Union League has arranged for a special room rate for workshop attendees. To receive the \$99 room rate, please ask for the "NC Credit Union League" rate. The cutoff date for room reservations at the special rate is Saturday, June 21, 2003.

Hotel Reservations Line: 1-800-228-9290

The hotel is 20 minutes from the Raleigh Durham Airport (RDU).